

graded claws and tails and retail meat packs. The market potential for vacuumed packed whole frozen lobster should also be examined. Preliminary taste tests on chefs in France suggest that this product could be an acceptable alternative to live lobster, providing a solid niche in the high value restaurant trade. Consideration should also be given to the development of prepared meals using lobster to meet the growing demand for upscale convenience foods. All of these changes will require increased investment on the part of the industry which will in turn have to be paid for by higher market prices.

### Frozen Lobster Meat

This product also known as "cold pack" accounts for 15% of Canadian lobster production. It refers to lobster which has been cooked, shelled and packed in cans without heat treatment. Five different grades of meat are produced satisfying different market niches. The United States is virtually the sole market for this product. The lack of heat treatment has resulted in contamination of the product. In 1988, the US found listeria in certain shipments from Canada. This has now resulted in the introduction of "enhanced sanitation procedures" in all processing plants. Current sampling on a shipment by shipment basis has found no evidence of listeria in Canadian product.

### Blue Mussels

I would now like to turn my attention to the market prospects for blue mussels. This is one of the few bright spots where in spite of dramatic growth in production over the past few years demand continues to exceed supply. The cultured mussel industry is relatively new in Canada, although mussels have been cultivated in Europe for over 100 years. Global production is estimated at about 450,000 tonnes. Canadian production in 1988 was a relatively modest 5000 tonnes. However, production has been increasing by 100 % a year since 1986. PEI accounts for 72% of Canadian production. Production is also expanding rapidly in the other Atlantic provinces and Quebec.

The United States is also a major producer of blue mussels with a production of about 20,000 tonnes in 1988. Unlike the Canadian product which is cultured off the bottom on ropes, US mussels are primarily bottom cultivated. The US mussel is also smaller in size and has a meat yield only half that of the Canadian mussel. Unlike Canada, the US also faces a major limitation on the availability of environmentally suitable growing areas. (Figure 5)

Canadian blue mussels are sold primarily in the domestic market. the major markets are within Atlantic Canada as well as the larger urban areas of eastern Canada, including Toronto, Montreal and Ottawa. However, in these markets it is the poorer quality imported US product both wild and cultivated which dominates. Correspondingly, only about 25 % of Canadian production is exported, the sole export market being the United States. Export